

### **SPECIAL FUNCTION PLANNING WORKSHEET**

**PURPOSE:** Provide a sample of a Special Function Planning Worksheet for use by catering staff and clients when planning a special event.

**SCOPE:** This Special Function Planning Worksheet applies to club managers, catering managers, kitchen managers, and all banquet, catering, and special function staff involved with booking, setting-up, preparing or serving a special event.

**GENERAL:** Organization and planning are the keys to success in any catered event. Being prepared and proactive to the clients needs saves time, money and builds good will. A detailed planning document allows staff to be fully effective and greatly enhances customer confidence levels and satisfaction.

#### **GUIDANCE:**

Special Function Planning Worksheets are a valuable tool for every catering operation. Their use helps to ensure that items the catering office has committed to are delivered to the customer. Their use has application, in all or part, by management, the set-up staff, the kitchen, porters, and storeroom personnel. They are also used at telephones in the catering office, the cashier area, the manager's office and in the office manager or receptionist's area.

## SPECIAL FUNCTION PLANNING WORKSHEET

**Organization/Group:** \_\_\_\_\_

**Host/Project Officer Name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Card Number:** \_\_\_\_\_ **Expiration Date:** \_\_\_\_\_

**Event Date:** \_\_\_\_\_ **Type of Event:** \_\_\_\_\_

**No. People:** \_\_\_\_\_ **Room(s)/Location:** \_\_\_\_\_

**Arrival Time:** \_\_\_\_\_ **Meeting Time:** \_\_\_\_\_ **Cocktails:** \_\_\_\_\_

**Meal/Food Service Time(s)** \_\_\_\_\_

**No. Bars:** \_\_\_\_\_ **Type of Bars:** \_\_\_\_\_ **Location of Bars:** \_\_\_\_\_

### Special Arrangement

#### Tables:

**U-Shaped:** \_\_\_\_\_ **T-Shaped:** \_\_\_\_\_ **E-Shaped:** \_\_\_\_\_ **Theater:** \_\_\_\_\_ **Conference:** \_\_\_\_\_

**Fan-Shaped:** \_\_\_\_\_ **Open Center Square:** \_\_\_\_\_ **Rounds: of:** \_\_\_\_\_ **Rounds of:** \_\_\_\_\_

**Banquets of:** \_\_\_\_\_ **Banquets of:** \_\_\_\_\_

**Mixed Table Arrangements: Tables for: 4, \_\_\_\_\_ 6, \_\_\_\_\_ 8, \_\_\_\_\_ 10, \_\_\_\_\_ 12, \_\_\_\_\_ 14, \_\_\_\_\_ 16, \_\_\_\_\_ 18, \_\_\_\_\_ 20, \_\_\_\_\_ Other, \_\_\_\_\_**

**Tables around dance floor:** \_\_\_\_\_ **Other:** \_\_\_\_\_

**Type of Head Table(s):** \_\_\_\_\_ **Number at Head Table(s):** \_\_\_\_\_

#### Linen:

**Skirting Color(s):** \_\_\_\_\_ **Top Cover Color(s):** \_\_\_\_\_

**Napkin Color(s):** \_\_\_\_\_

#### Special Table Requirements:

**Registration Table/Chairs: Size:** \_\_\_\_\_ **Type:** \_\_\_\_\_ **Chairs:** \_\_\_\_\_

**Skirt/Topper Colors:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Guest Book Table: Size:** \_\_\_\_\_ **Type:** \_\_\_\_\_ **Chairs:** \_\_\_\_\_

**Skirt/Topper Colors:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Name Tag Table: Size:** \_\_\_\_\_ **Type:** \_\_\_\_\_ **Chairs:** \_\_\_\_\_

**Skirt/Topper Colors:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Cake Table:**                      **Size:** \_\_\_\_\_ **Type:** \_\_\_\_\_  
   **Skirt/Topper Colors:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Groom's Cake Table:** **Size:** \_\_\_\_\_ **Type:** \_\_\_\_\_  
   **Skirt/Topper Colors:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Gift Display Table:**    **Size:** \_\_\_\_\_ **Type:** \_\_\_\_\_  
   **Skirt/Topper Colors:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Projector Table/Chairs:** **Size:** \_\_\_\_\_ **Type:** \_\_\_\_\_ **Chairs:** \_\_\_\_\_  
   **Skirt/Topper Colors:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Other Table/Chairs:**    **For:** \_\_\_\_\_  
   **Size:** \_\_\_\_\_ **Type:** \_\_\_\_\_ **Chairs:** \_\_\_\_\_  
   **Skirt/Topper Colors:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Special Needs:**

**Dance Floor:** **Size:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Podium:** \_\_\_\_\_

**Lecturn:** \_\_\_\_\_

**Stage Risers:** \_\_\_\_\_

**Microphone(s):** \_\_\_\_\_

**Extension Cords:** \_\_\_\_\_

**Easel(s):** \_\_\_\_\_

**Port-a-Sound System:** \_\_\_\_\_

**Movie Screen(s):** \_\_\_\_\_

**Flag Stands/Flags:** \_\_\_\_\_

**Changing Room:** \_\_\_\_\_

**Message Board:** \_\_\_\_\_

**Lobby Directory Board to Read:** \_\_\_\_\_

**Black Board:** \_\_\_\_\_

**Flip Chart/Markers:** \_\_\_\_\_

**Portable Screens/Dividers:** \_\_\_\_\_

**Telephone Connections:** \_\_\_\_\_

**Technology Connections:** \_\_\_\_\_

**Piano:** \_\_\_\_\_

**Candles:** \_\_\_\_\_ **Size:** \_\_\_\_\_ **Color:** \_\_\_\_\_

**Music:** \_\_\_\_\_ **Charges:** \_\_\_\_\_

**Special Entertainment:** \_\_\_\_\_ **Charges:** \_\_\_\_\_

**Centerpieces:** \_\_\_\_\_ **Charges:** \_\_\_\_\_

**Specialty Decorations:** \_\_\_\_\_ **Charges:** \_\_\_\_\_

**Tablets/Pencils:** \_\_\_\_\_ **Charges:** \_\_\_\_\_

**Mints/Nuts/Candy:** \_\_\_\_\_ **Charges:** \_\_\_\_\_

**Coat Room Attendant:** \_\_\_\_\_ **Charges:** \_\_\_\_\_

**Valet Parking:** \_\_\_\_\_

**Rental Requirements:** \_\_\_\_\_

**Special Instructions:** \_\_\_\_\_

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<u>Quantity</u>	<u>Menu Selections</u>	<u>Unit Cost</u>
<u>Total Cost</u>		

**Total Food Costs:** \$ \_\_\_\_\_  
**Total Beverage Charges:** \$ \_\_\_\_\_  
**Service Charges:** \$ \_\_\_\_\_  
**Room Preparation Fees:** \$ \_\_\_\_\_  
**Entertainment Charges:** \$ \_\_\_\_\_  
**Decoration Charges:** \$ \_\_\_\_\_  
**Rental Charges (If applicable):** \$ \_\_\_\_\_

**Total Charges:** \$ \_\_\_\_\_  
**Advance Payment:** \$ \_\_\_\_\_ **Date:** \_\_\_\_\_  
**Balance Due:** \$ \_\_\_\_\_  
**Charge To: (Name & Account Number):** \_\_\_\_\_  
**Total Miscellaneous Charges:** \_\_\_\_\_

Customer/Member Signature: \_\_\_\_\_ Date \_\_\_\_\_  
 Caterer Signature: \_\_\_\_\_ Date \_\_\_\_\_  
 Manager Signature: \_\_\_\_\_ Date \_\_\_\_\_

Diagram for \_\_\_\_\_ Proposal/Contract # \_\_\_\_\_  
 Event Date: \_\_\_\_\_ Time: \_\_\_\_\_ Room Location: \_\_\_\_\_

**SUMMARY:**

Worksheets are valuable for planning a special function with a client/customer/member. It allows you and the client to agree on some of the basic and specific requirements for their special function. It is root document from which the Catering Manager writes the proposal and the reference document for writing a final contract. Worksheets can be mailed or given to party hosts who are working with a committee. It is a valuable planning tool to ensure they don't forget important elements necessary to support their event. Worksheets such as this one are used throughout the industry. Having all details spelled out clearly in advance helps ensure the staff is pro-active instead of re-active on the day of event.